Assignment 4:
Homework for the NPGS GRIN-Global before Webinar 5

Revision Date
November 3, 2023

This exercise should be completed **before** you attend
the 5th webinar session.

"Part of the secret of a success in life is to eat what you like
and let the food fight it out inside."
Mark Twain

In this assignment, we'll use the Curator Tool (CT), as well as the Public Website (PW).

Cooperators

In the Curator Tool, open the Cooperator Wizard and become familiar with it. Practice searching for cooperators and web cooperators. You could also use the Search Tool first to find valid cooperators and web cooperators, but the Cooperator Wizard has some nice filtering features. It is also good to know what the Cooperator Wizard is displaying, as it is also used when processing requests via the Order Wizard.

In the image below, the **Web Cooperator** *Reisinski* has two corresponding **Cooperator** records:
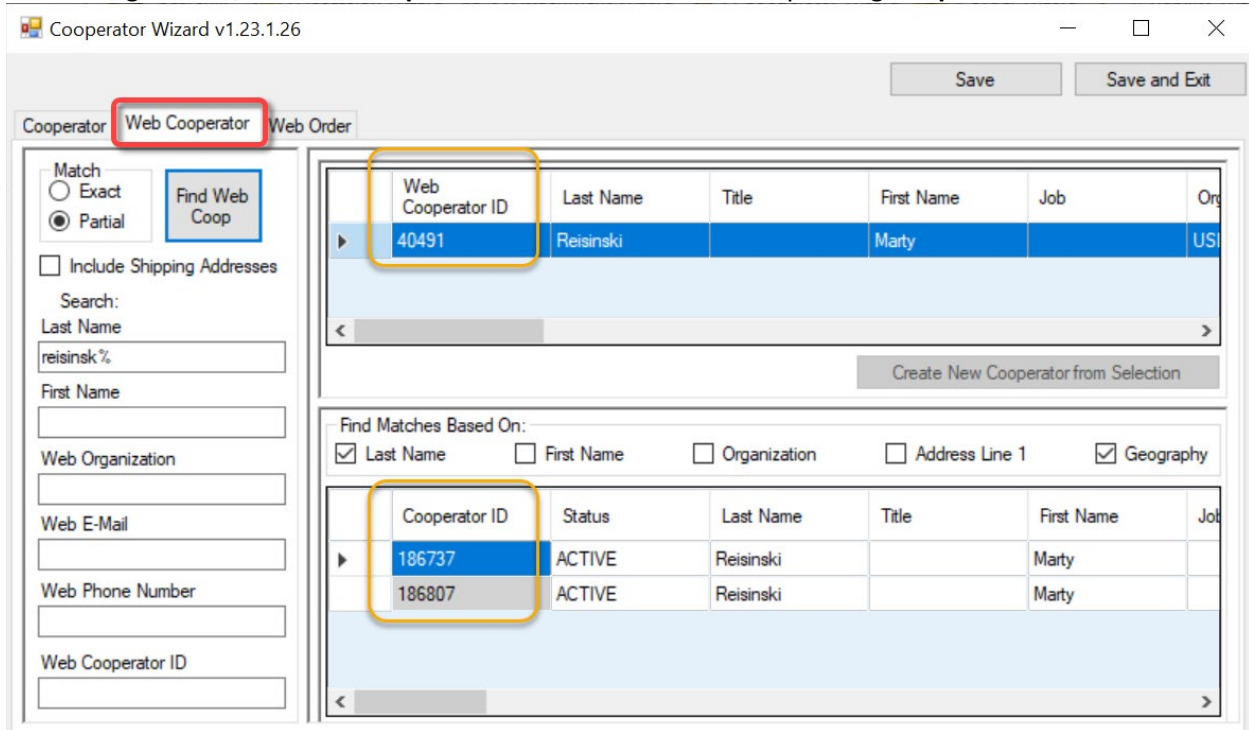
Login to the Public Website

Login. Complete your profile on TRAINING if you haven't done that already.
https://training.ars-grin.gov/gringlobal/search

The important thing is to complete your shipping information. You will need to edit your PW training account profile.

The registration form is fairly self-explanatory. The following partial form has been filled:

https://training.**ars-grin.gov**/gringlobal/userProfile

Your Profile [Edit]

If this information is not correct, please click the Edit button above. After you've completed editing, click the Update button above.

| ✉ Email | marty.reisinger@usda.gov | [Change email] |
| 🔑 Password | ************ | [Change password] |

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Practice some Public Website (PW) searches.

Try practicing the following:

    a. Simple searches:
        i.   for an accession by its Prefix
       ii.   by a common name: such as elderberry
      iii.   by genus: canadensis
      iv.   accessions you created for which you created inventory records that are available and distributable

## Submit a Request on TRAINING

While logged in under your TRAINING account, select one or two of your accessions and add them to your cart.

Complete the ordering process. Be sure to clearly state in the Remarks box that this is for training purposes [Do not fill!!!] and that the request should not be filled.

After successfully submitting. you should see a web request number. You can also check under **Your Profile – Your Request History**.

Use the Order Wizard to Process the Request

Switch gears and as a genebank staff person, use the Curator Tool to find this incoming web request. Start by having an empty folder ready on the left panel. On the right, open the Order dataview tab; then start the Order Wizard.
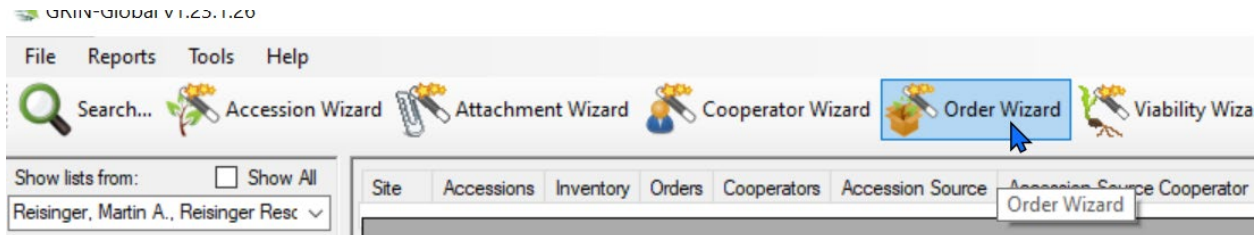
Use the **Web Orders** tab and indicate the request number.
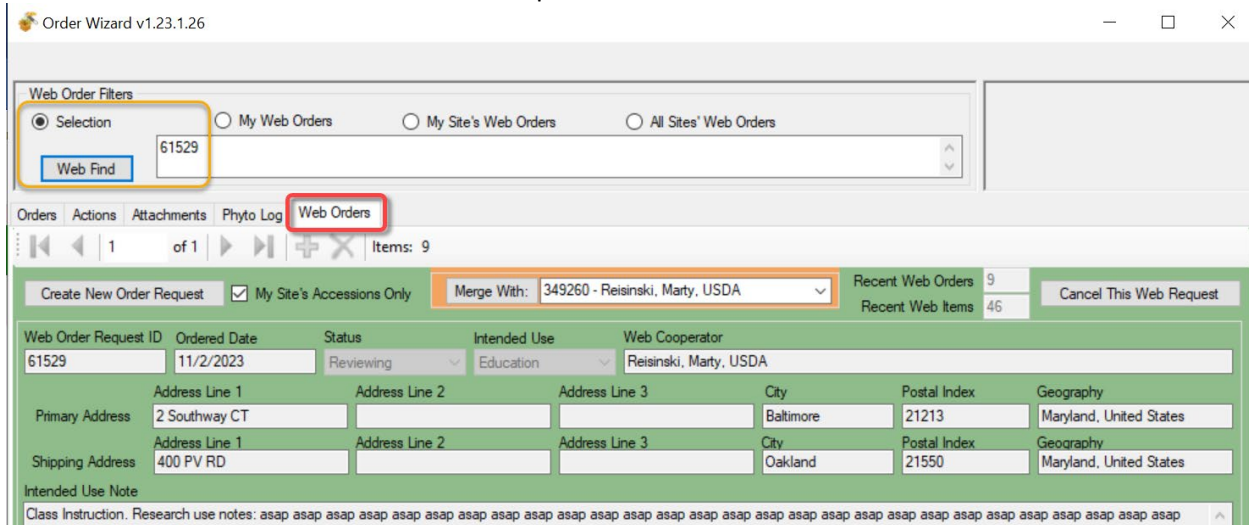
Then click the **Create New Order Request** button and proceed to generate an order from the request. The trickiest part of working with the OW is selecting the cooperators / addresses. You will need to select the two cooperator / addresses from the Cooperator Wizard. Complete directions are in the guide: http://grin-global.org/docs/gg_order_and_cooperator_wizard_v1.9.9.4.docx

An additional guide, has the complete background on order processing:
http://grin-global.org/docs/gg_order_processing.docx

Remember who submitted this request? It was you, using your TRAINING Public Website account. If this is your first order, then a cooperator record most likely doesn't exist in the database and you will be prompted to add one or two. (if the shipping address differs from the primary address two new cooperator records are added.)

When the Order Wizard opens the Cooperator Wizard, both radio buttons, **Primary** and **Ship To,** are red. They ultimately need to be black to proceed with the Order Wizard.
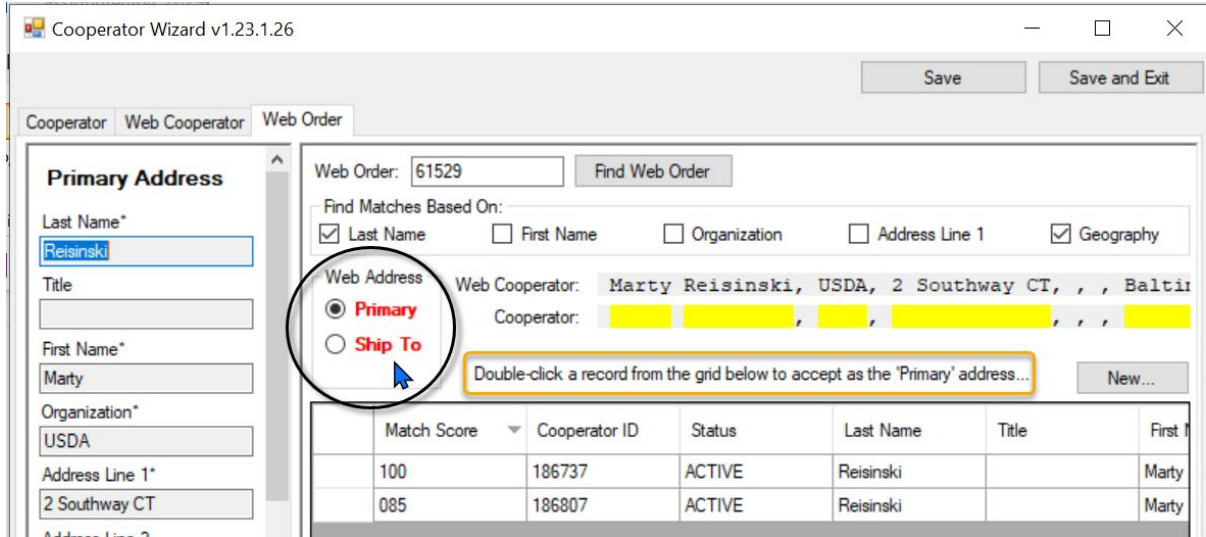
When you see the OW screen looking like this, then you are on the correct path to processing:
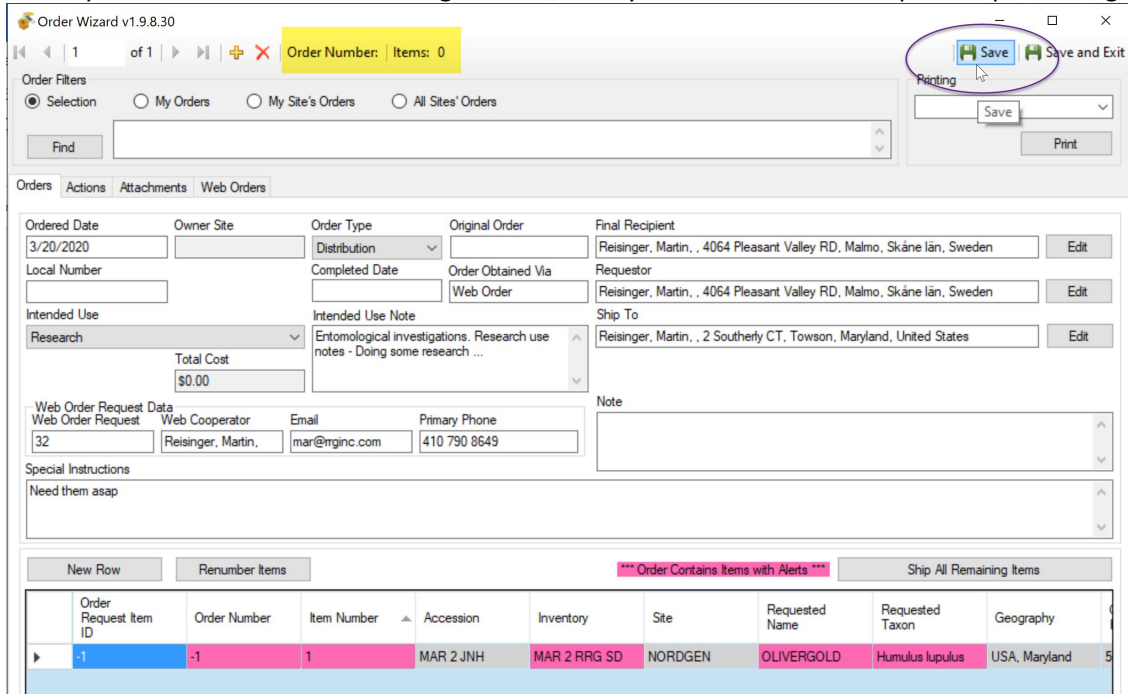
Until you save, the Order Number is blank, and the number of items is zero (highlighted above). After you click on **Save**, the order number will be filled in:

To keep the exercise simple, you can just click on the **Ship All Remaining Items** button. That essentially completes the order and a Completed Date will be filled in. You can return to the Public Website and review the status of the request and you should see Shipped and Completed actions listed.

Try the entire ordering process, from Public Website searching for accession and adding toy our cart, to switching over to the CT and processing the incoming request.